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July 17, 2026

The Board of Commissioners of Public Utilities
Prince Charles Building
120 Torbay Road, P.O. Box 21040
St. John's, NL A1A 5B2

Attention: Mike McNiven
Senior Regulatory Advisor & Board Secretary

Re: Monthly Energy Supply Report for the Island Interconnected System for June 2026

Enclosed please find Newfoundland and Labrador Hydro's Monthly Energy Supply Report for the Island Interconnected System as directed by the Board of Commissioners of Public Utilities.

Should you have any questions, please contact the undersigned.

Yours truly,

NEWFOUNDLAND AND LABRADOR HYDRO

A handwritten signature in blue ink, appearing to read "Shirley A. Walsh", written over a horizontal line.

Shirley A. Walsh
Senior Legal Counsel, Regulatory
SAW/mc

Encl.

ecc:

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Monthly Energy Supply Report for the Island Interconnected System for June 2026

July 17, 2026

A report to the Board of Commissioners of Public Utilities



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1.0 Introduction

On February 8, 2016, the Board of Commissioners of Public Utilities (“Board”) requested Newfoundland and Labrador Hydro (“Hydro”) file a biweekly report containing, but not limited to, the following:

- 1) System Hydrology Report;
- 2) The thermal plant operated in support of hydrology;
- 3) Production by plant/unit; and
- 4) Details of any current or anticipated long-term derating.

In July 2016, the Board indicated that a monthly report would thereafter be sufficient. This report provides data for June 2026.

Ownership of the Water Management function resides within Hydro in the Resource and Production Planning department and is at all times guided by Hydro’s operating instructions and environmental standards. This group works in consultation with Energy Marketing to optimize the use of Hydro’s hydrologic resources through imports/exports and to ensure that the security of supply for domestic load for Hydro’s customers remains paramount in all decisions, ensuring the delivery of least-cost, reliable service in an environmentally responsible manner.

2.0 System Hydrology

Reservoir inflows in June 2026 were equal to the month’s historical average.¹ Table 1 summarizes the aggregate storage position of Hydro’s reservoirs at the end of the reporting period.

Table 1: System Hydrology Storage Levels

	2026	2025	20-Year Average	Minimum Storage Limit	Maximum Operating Level	Maximum Operating Level
Date	(GWh)	(GWh)	(GWh)	(GWh)	(GWh)	(%)
30-Jun-2026	2,079	1,877	2,139	1,423	2,588	80

¹ Calculated in terms of energy [gigawatt hour (“GWh”)].

1 The aggregate reservoir storage level on June 30, 2026 was 2,079 GWh, which is 20% below the seasonal
 2 maximum operating level and 46% above the minimum storage limit.² Total system energy for the
 3 month decreased by 10 GWh overall, resulting in a total system energy storage 60 GWh below the
 4 20-year average. Inflows to the reservoirs of the Bay d’Espoir Hydroelectric Generating Station
 5 (“Bay d’Espoir”) were 72% of average in June 2026. Inflows to the Hinds Lake Reservoir were 130% of
 6 average and inflows to the Cat Arm Reservoir were 145% of average during the month.

7 Total precipitation for the month of June across Hydro’s reservoir system was 126 mm at Burnt Dam,
 8 86 mm at Long Pond, and 116 mm at Hinds Lake.

9 Table 2 summarizes the unit outages experienced during June 2026.

Table 2: June 2026 Unit Outage Summary

Unit Name	Date Offline	Return to Service	Outage type	Notes
Bay d’Espoir Unit 1	May 6, 2026	June 11, 2026	Planned	n/a
Bay d’Espoir Unit 1	June 13, 2026	June 14, 2026	Unplanned	Shear pin alarm.
Bay d’Espoir Unit 1	June 18, 2026	June 18, 2026	Unplanned	Shear pin failure.
Bay d’Espoir Unit 2	May 6, 2026	June 20, 2026	Planned	Planned outage return to service extended from June 12 to June 20.
Bay d’Espoir Unit 3	June 15, 2026	n/a	Planned	n/a
Bay d’Espoir Unit 4	June 15, 2026	n/a	Planned	n/a
Granite Canal	June 6, 2026	June 6, 2026	Unplanned	Unit tripped on startup.
Granite Canal	June 29, 2026	n/a	Planned	n/a
Cat Arm Unit 1	June 29, 2026	June 30, 2026	Unplanned	Trip due to lightning.
Cat Arm Unit 2	June 29, 2026	June 30, 2026	Unplanned	Trip due to lightning.
Hinds Lake	May 24, 2026	n/a	Planned	n/a

10 Figure 1 plots the 2025 and 2026 storage levels, minimum storage limits, maximum operating level
 11 storage, and 20-year average aggregate storage for comparison. In addition to the 2025–2026 minimum
 12 storage limits presented in Figure 1, Hydro has established the minimum storage limits to April 30, 2027.
 13 The 2026–2027 minimum storage limits were developed considering maximized delivery of power from

² Minimum storage limits are developed annually to provide guidance in the reliable operation of Hydro’s major reservoirs—Victoria, Meelpaeg, Long Pond, Cat Arm, and Hinds Lake. The minimum storage limit is designed to indicate the minimum level of aggregate storage required such that if there was a repeat of Hydro’s critical dry sequence, or other less severe sequence, Hydro’s load can still be met through the use of the available hydraulic storage supplemented with maximized deliveries of power from the Muskrat Falls Hydroelectric Generating Facility (“Muskrat Falls”) over the Labrador-Island Link (“LIL”). Hydro’s long-term critical dry sequence is defined as January 1959 to March 1962. Other dry periods are also considered during this analysis to ensure that no other shorter-term historic dry sequence could result in insufficient storage.

- 1 the Muskrat Falls Hydroelectric Facility, supplemented by available Recapture Energy from the Churchill
- 2 Falls Generating Station over the LIL, utilizing the transmission limits associated with the full under-
- 3 frequency load shedding limit of 57.7 Hz.³

³ The minimum storage methodology was updated to ensure Hydro's reservoirs could continue to provide reliable service to customers at the lowest possible cost, in an environmentally responsible manner. The 2026–2027 analysis assumed that only one unit at the Holyrood Thermal Generating Station ("Holyrood TGS") would be online and operating at minimum load during the winter 2026–2027 period. This assumption was made to de-risk island system energy storage based on global market uncertainty associated with fuel prices and supply. Hydro plans to have all three units at the Holyrood TGS available at full capability, if needed. However, Hydro expects Island reservoirs to be supported with Muskrat Falls energy instead of thermal energy from the Holyrood TGS.

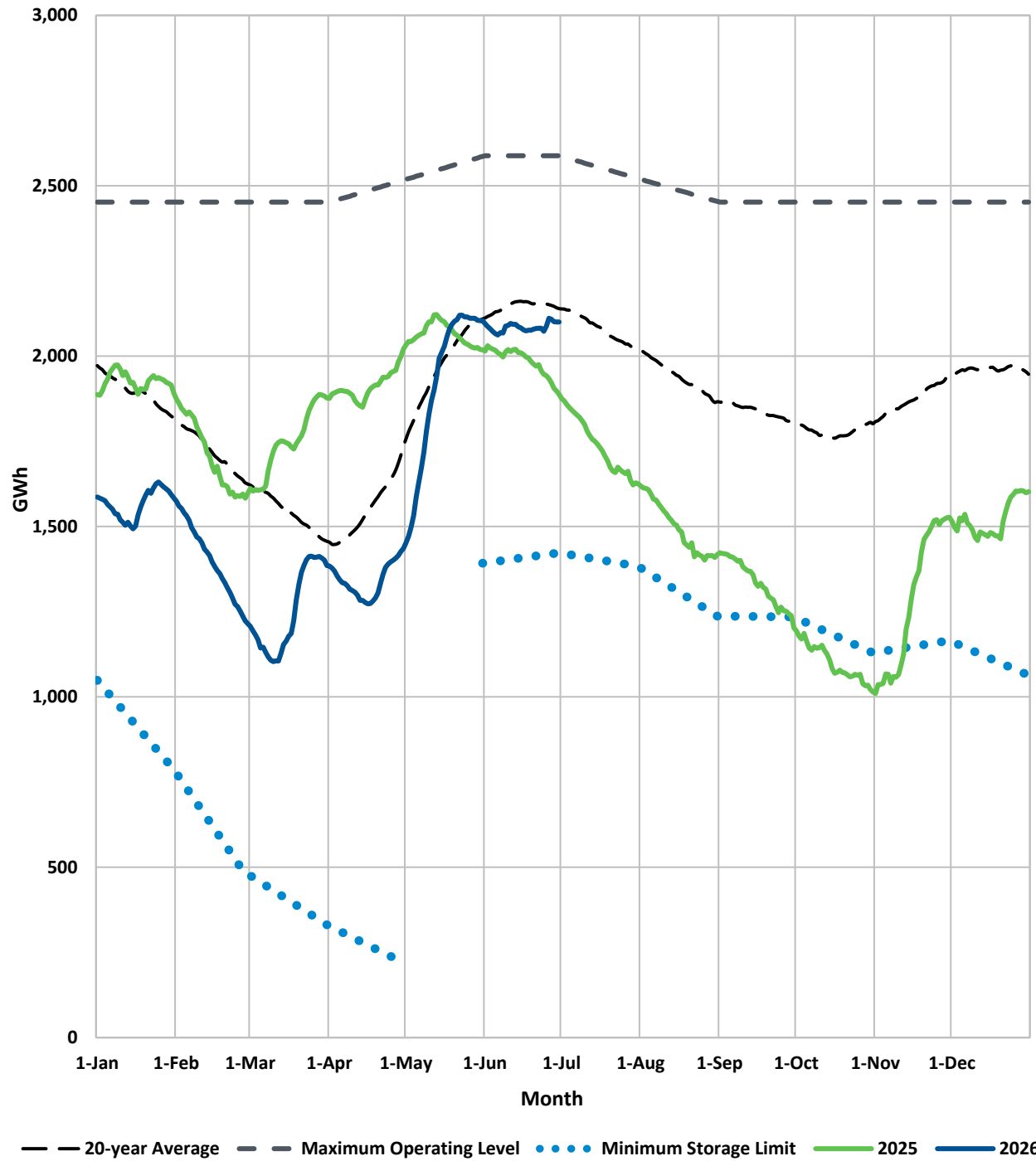


Figure 1: Total System Energy Storage⁴

⁴ Data points in Figure 1 represent storage at the beginning of each day. Table 1 reports the end-of-day storage values, which results in a small difference between the storage data presented in Table 1 and Figure 1.

2.1 Ponding

In Board Order No. P.U. 49(2018), the Board approved Hydro's application for approval of a Pilot Agreement for the Optimization of Hydraulic Resources ("Pilot Agreement").⁵ The intent of the Pilot Agreement is to optimize Hydro's hydraulic resources through the strategic use of its storage capabilities, taking advantage of the variability of energy pricing in external markets over time.

Appendix A provides information regarding imported and exported energy transactions under the Pilot Agreement during the month. Ponding imports were placed on hold in April due to high inflows and increasing reservoir levels to reduce risk of spill. In light of the standing instruction for spill exports issued by Hydro on May 12, 2026, Energy Marketing's negative ponding balance of 5,097 MWh was transferred to spill avoidance exports on June 15, 2026.

No ponding exports or imports occurred over the Maritime Link ("ML") during June 2026.

2.2 Spill Activity

Appendix A provides information regarding spill avoidance export transactions undertaken.⁶ On May 12, 2026, a standing instruction was issued to Energy Marketing to seek spill avoidance exports for Hinds Lake and Cat Arm due to the projected risk of spill and inability to maintain maximized generation at the facilities based on native load alone. The standing instruction remained in place for Cat Arm throughout June 2026, resulting in 1.3 GWh of spill avoidance exports throughout the month. Spill releases from the Cat Arm reservoir were required starting June 9 and continued for the duration of the month. Hinds Lake started its planned outage on May 24, 2026, and spill releases were required starting June 25 and continued for the rest of the month to keep the reservoir within safe operating limits while the planned outage was ongoing.

A summary of the year-to-date ("YTD") total volumes spilled or bypassed in both MCM⁷ and GWh for the Island Interconnected System in June 2026 can be found in Table 3. Avoided spill energy is shown in Table A-2.

⁵ The Third Amended and Restated Pilot Agreement for the Optimization of Hydraulic Resources was approved as per Board Order No. P.U. 35(2022), and was extended as per Board Order No. P.U. 30(2023), Board Order No. P.U. 29(2024), and again in Board Order No. P.U. 37(2025).

⁶ Pursuant to the Pilot Agreement, exporting when system load is low allows for increased generation from Island hydraulic facilities and the utilization of water (energy) that would have otherwise been spilled, while not increasing the risk of spill elsewhere in the system.

⁷ Million cubic metres ("MCM").

Table 3: Spill Activity

	Granite Canal Bypass		Burnt Dam Spillway		North Salmon Bypass		Cat Arm Spillway		Hinds Lake Spillway	
	MCM	GWh	MCM	GWh	MCM	GWh	MCM	GWh	MCM	GWh
30-June-2026	-	-	-	-	-	-	90.3	81.2	33.8	18.2
YTD Total	42.4	4.0	9.9	6.5	17.5	2.3	90.3	81.2	33.8	18.2

3.0 Production and Purchases

Appendix B provides a breakdown of power purchases, including the import and export activity over the LIL and ML as well as production by plant during June 2026.⁸ There was 1.2 GWh of energy imported over the ML from June 22–25, 2026 to minimize standby generation during a planned bipole outage on the LIL. There was 0.4 GWh of energy repaid from Corner Brook Pulp and Paper (“CBPP”) to Energy Marketing under the Temporary Energy Exchange Agreement in June 2026. This energy was exported over the ML. No emergency energy was supplied to Nova Scotia over the ML during June 2026.

4.0 Thermal Production

No Holyrood TGS units were online for system requirements in June 2026. There was no energy production and standby generation was not used to support reservoir storage. The operating hours for the Holyrood TGS, Holyrood Combustion Turbine (“CT”), and the Hardwoods and Stephenville Gas Turbines (“GT”) are summarized in Table 4.

Table 4: Holyrood TGS and Combustion Turbines Operating Hours

	Operating Hours	Sync Condense Hours	Available Hours
Holyrood TGS			
Unit 1	0.0	0.0	0.0
Unit 2	0.0	0.0	0.0
Unit 3	0.0	720.0	720.0
Combustion Turbines			
Hardwoods GT	1.4	718.6	720.0
Stephenville GT	2.3	70.0	720.0
Holyrood CT	1.6	0.0	720.0

⁸ On April 1, 2021, Hydro entered into an agreement with CBPP to send energy to supplement low reservoir levels. This energy is to be exported and not used to supply the Island Interconnected System.

5.0 Unit Deratings

Holyrood TGS Unit 1 began its planned annual outage on May 24, 2026 and remained on planned outage for the entire month of June, 2026. The outage is scheduled to continue until October 3, 2026.

Holyrood TGS Unit 2 began its planned annual outage on May 6, 2026 and remained on planned outage for the entire month of June, 2026. The outage is scheduled to continue until September 26.

Holyrood TGS Unit 3 was on planned annual maintenance outage for the entire month of June 2026. The outage began on schedule on March 29, 2026. The original return to service date of July 18, 2026 was extended to August 29, 2026 because boiler condition assessment inspections of the waterwall floor tubes identified areas requiring pad weld repairs and tube replacements. On May 1, 2026 the generator was placed online in synchronous condenser mode.

The Hardwoods GT was available at full capacity for the entire month of June 2026, with the exception of an unplanned derating on June 10, 2026 as End B became unavailable due to a faulty pressure control valve on the air starting system. A spare valve was installed and the unit was returned to full capacity on the same day.

The Holyrood CT was available at full capacity for the entire month of June 2026.

Stephenville GT was available at 50% for the first two weeks of the month of June 2026, as End B was unavailable as a result of Hydro's investigation into the fire on the End B power turbine on April 11, 2026. The investigation determined that an exhaust leak from the End B power turbine was a contributing cause of the fire. As such, repairs were required to mitigate the risk of a fire reoccurring. Stephenville End B was released for service on June 12, 2026.

Appendix A

Ponding and Spill Transactions



Table A-1: Ponding Transactions

Date	Ponding Imports (MWh)	Ponding Exports (MWh)	Ponding Imports Purchased by Hydro (MWh)	Transfer of Pond Balance to Spill Avoidance (MWh)	Energy Losses to Export (MWh)	Cumulative Pondered Energy (MWh)
Opening Balance	-	-	-	-	-	(5097)
15-Jun-2026	-	-	-	5097	-	-
Total ¹	-	-	-	5097	-	-

Table A-2: Avoided Spill Energy

Date	Avoided Spill Exports (MWh)	Energy Losses to Export (MWh)	Transfer of Pond Balance to Spill Avoidance (MWh)	YTD Avoided Spill Energy (MWh)	Cumulative Avoided Spill Energy (MWh)
Opening Balance	-	-	-	-	(1,749)
5-Jun-2026	(163)	(27)	-	(190)	(1,939)
6-Jun-2026	(97)	(4)	-	(101)	(2,040)
7-Jun-2026	(319)	(44)	-	(363)	(2,403)
8-Jun-2026	(125)	(15)	-	(140)	(2,543)
9-Jun-2026	(345)	(39)	-	(384)	(2,927)
10-Jun-2026	(33)	(6)	-	(39)	(2,966)
15-Jun-2026 ¹	-	-	(5,097)	(5,097)	(8,063)
24-Jun-2026	(60)	(6)	-	(66)	(8,129)
Total	(1,142)	(141)	(5,097)	(6,380)	(8,129)

¹ Total transactions for June 2026.

Appendix B

Production and Purchase



Table B-1: Generation and Purchases (GWh)^{1,2}

	Jun-26	YTD Jun 2026
Hydro Generation (Hydro)		
Bay d'Espoir		
Unit 1	11.5	147.2
Unit 2	6.1	98.0
Unit 3	16.4	192.3
Unit 4	7.7	107.5
Unit 5	40.0	199.0
Unit 6	40.2	200.3
Unit 7	61.2	472.8
Subtotal Bay d'Espoir	183.1	1,417.1
Upper Salmon	42.1	272.2
Granite Canal	9.7	119.0
Hinds Lake	0.0	185.4
Cat Arm		
Unit 1	44.0	253.3
Unit 2	36.8	212.6
Subtotal Cat Arm	80.9	465.9
Paradise River	0.4	16.6
Star Lake	11.8	71.4
Rattle Brook	2.4	8.9
Exploits	47.0	289.9
Mini Hydro	0.0	0.0
Total Hydro Generation (Hydro)	377.4	2,846.4
Thermal Generation (Hydro)		
Holyrood TGS		
Unit 1	0.0	176.1
Unit 2	0.0	151.4
Unit 3	0.0	56.0
Subtotal Holyrood TGS Units	0.0	383.5
Holyrood Combustion Turbine and Diesels	0.0	6.8
Hardwoods Gas Turbine	0.0	1.1
Stephenville Gas Turbine	0.0	1.0
Other Thermal	0.1	0.3
Total Thermal Generation (Hydro)	0.1	392.7
Purchases		
Requested Newfoundland Power and Vale CBPP	0.0	0.2
Capacity Assistance	0.0	0.0
Power Purchase Agreement ³	0.4	155.9
Secondary	4.2	6.3
Co-Generation	10.1	20.5
Subtotal CBPP	14.6	182.7
Wind Purchases	8.5	97.7
Maritime Link Imports ⁴	1.2	2.4
New World Dairy	0.0	1.0
Labrador Island Link Delivery to IIS ^{5,6}	68.6	643.0
Total Purchases	92.9	927.0
Total	470.4	4,166.1

¹ Gross generation.

² Actuals reflect rounded values to the nearest tenth of a GWh. Differences between total versus addition of individual components due to rounding.

³ Energy repaid from CBPP to Energy Marketing under the Temporary Energy Exchange Agreement that was exported over the ML.

⁴ Includes energy flows as a result of purchases and inadvertent energy.

⁵ LIL deliveries to the Island Interconnected System are calculated as LIL imports of 226.6 GWh less ML exports of 158.0 GWh.

⁶ Net energy delivered to the Island Interconnected System is less than the total energy delivery to Hydro under the Muskrat Falls Power Purchase Agreement because of transmission losses on the LIL.